



## ELECTRONIC INFORMATION DISCLOSURE STATEMENT

Electronic Version v18

Stylesheet Version v18.0

### Title of Invention

INTELLIGENT CALL ROUTING FOR CROSS-SELL OFFER  
SELECTION BASED ON OPTIMIZATION PARAMETERS  
AND/OR ACCOUNT LEVEL DATA

Application Number: 10/799712



Confirmation Number: 8969

First Named Applicant: Lizhi MA et al.

Attorney Docket Number: 47004.000280

Search string: ( 5414754 or 5452350 or 5530744 or 6052460  
or 6064973 or 6215783 or 4694397 or 4722054  
or 4745468 or 4774664 or 4797911 or 4914587  
or 4926255 or 4932046 or 5121945 or 5179584  
or 5259023 or 5383113 or 5555299 or 5559855  
or 5561707 or 5594791 or 5615341 or 5684863  
or 5715450 or 5742775 or 5745706 or 5758126  
or 5765142 or 5793846 or 5815551 or 5832447  
or 5835087 or 5923745 or 5953406 or 6016344  
or 6098052 or 6100891 or 6101486 or 6212178  
or 6230287 or 6233332 or 6304653 or 4649563  
or 4694483 or 4792968 or 20020016769 or  
20020023055 or 20020059141 or  
20010047489 ).pn.

### US Patent Documents

Note: Applicant is not required to submit a paper copy of cited US Patent Documents

| init  | Cite.No. | Patent No. | Date       | Patentee      | Kind | Class | Subclass |
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| /K.N/ | 1        | 5414754    | 1995-05-09 | Pugh          |      |       |          |
|       | 2        | 5452350    | 1995-09-19 | Reynolds      |      |       |          |
|       | 3        | 5530744    | 1996-06-25 | Charalambous  |      |       |          |
|       | 4        | 6052460    | 2000-04-18 | Fisher        |      |       |          |
|       | 5        | 6064973    | 2000-05-16 | Smith         |      |       |          |
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## US Published Applications

Note: Applicant is not required to submit a paper copy of cited US Published Applications

| init                                | Cite.No. | Pub. No.    | Date       | Applicant      | Kind | Class | Subclass |
|-------------------------------------|----------|-------------|------------|----------------|------|-------|----------|
| //K.N//                             | 1        | 20020016769 | 2002-02-07 | Barbara et al. |      |       |          |
| <input type="checkbox"/>            | 2        | 20020023055 | 2002-02-21 | Antognini      |      |       |          |
| <input type="checkbox"/>            | 3        | 20020059141 | 2002-05-16 | Davies et al.  |      |       |          |
| <input checked="" type="checkbox"/> | 4        | 20010047489 | 2001-11-29 | Ito et al.     |      |       |          |

## Signature

| Examiner Name | Date       |
|---------------|------------|
| /Khai Nguyen/ | 05/21/2007 |



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Attorney Docket Number: 47004.000280

Search string: ( 4845739 or 4930150 or 4939773 or 4975945  
or 4987590 or 5014298 or 5073929 or 5091933  
or 5128984 or 5164981 or 5181238 or 5185787  
or 5206903 or 5212789 or 5224153 or 5231571  
or 5251252 or 5255309 or 5278898 or 5297197  
or 5309505 or 5309513 or 5351285 or 5359645  
or 5396542 or 5436965 or 5442688 or 5444774  
or 5450479 or 5465290 or 5467391 or 5495284  
or 5511112 or 5515428 or 5517566 or 5519772  
or 5546452 or 5561711 or 5608785 or 5608789  
or 5675607 or 5742675 or 5757904 or 5761288  
or 5784452 or 5787154 or 5825856 or 5825870  
or 5828734 or 5848143 ).pn.

### US Patent Documents

Note: Applicant is not required to submit a paper copy of cited US Patent Documents

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Signature

| Examiner Name | Date       |
|---------------|------------|
| /Khai Nguyen/ | 05/21/2007 |



Substitute for form 1449A/PTO

**INFORMATION DISCLOSURE  
STATEMENT BY APPLICANT**

(use as many sheets as necessary)

|                        |                 |
|------------------------|-----------------|
| Application Number     | 10/799,712      |
| Filing Date            | March 15, 2004  |
| First Named Inventor   | Lizhi MA et al. |
| Art Unit               | Unassigned      |
| Examiner Name          | Unassigned      |
| Attorney Docket Number | 47004.000280    |

Sheet 1 of 2

**NON-PATENT LITERATURE DOCUMENTS**

| Examiner<br>Initials | Cite<br>No. | Include name of the author (in CAPITAL LETTERS), title of the article (when appropriate), title of the item (book, magazine, journal, serial, symposium, catalog, etc.), date, page(s), volume-issue number(s), publisher, city and/or country where published | TRANSLATION |    |
|----------------------|-------------|--|-------------|----|
|                      |             |  | YES         | NO |
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| /K.N./               | 2.          | Computer Telephony Solutions, The Customer Interaction Specialists, printed 5/25/99, 1 page  |             |    |
| /K.N./               | 3.          | VocalTec Ltd., VocalTec Telephony Gateway, Product Brochure, 8 pages, 1993-1996  |             |    |
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| /K.N./               | 5.          | VocalTec Ltd., Telephony Gateway, Product Overview, VocalTec's Telephony Gateway Product Component Description and Functional Specifications, 9 pages, 1993-1996   |             |    |
| /K.N./               | 6.          | Computer Telephony Solutions - Telemarketing, The Customer Interaction Specialists, Telemarketing & Customer Support Outsourcing, printed 5/25/99, 2 pages   |             |    |
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| /K.N./               | 8.          | KELLY MAHONEY, Customer base management: Leverage telemarketing and call center environment, Direct Marketing, Vol. 95, No. 6, pp. 20, 67, Oct. 1996 (Abstract - 3 pages)  |             |    |
| /K.N./               | 9.          | CSU/DSU (Channel Service Unit/Data Service Unit), pp. 208-210  |             |    |
| /K.N./               | 10.         | Computer Telephony Solutions - Computer Telephony, The Customer Interaction Specialists, Computer Telephony Systems, printed 5/25/99, 3 pages  |             |    |
| /K.N./               | 11.         | Computer Telephony Solutions - Call/Web Centres, The Customer Interaction Specialist, Call and Web Centres, printed 5/25/99, 5 pages   |             |    |

EXAMINER SIGNATURE /Khai Nguyen/

DATE CONSIDERED 05/21/2007

\*EXAMINER: Initial if reference considered, whether or not citation is in conformance with MPEP 609. Draw line through citation if not in conformance and not considered. Include copy of this form with next communication to applicant.

| Substitute for form 1449A/PTO<br><br><b>INFORMATION DISCLOSURE<br/>STATEMENT BY APPLICANT</b><br><i>(use as many sheets as necessary)</i>   |             |  |             | Application Number             |  | 10/799,712      |  |
|---|-------------|--|-------------|--------------------------------|--|-----------------|--|
|   |             |  |             | Filing Date                    |  | March 15, 2004  |  |
|   |             |  |             | First Named Inventor           |  | Lizhi MA et al. |  |
|   |             |  |             | Art Unit                       |  | Unassigned      |  |
|   |             |  |             | Examiner Name                  |  | Unassigned      |  |
| Sheet   | 2           | of   | 2           | Attorney Docket Number         |  | 47004.000280    |  |
| <b>NON-PATENT LITERATURE DOCUMENTS</b>  |             |  |             |                                |  |                 |  |
| Examiner<br>Initials  | Cite<br>No. | Include name of the author (in CAPITAL LETTERS), title of the article (when appropriate), title of the item (book, magazine, journal, serial, symposium, catalog, etc.), date, page(s), volume-issue number(s), publisher, city and/or country where published | TRANSLATION |                                |  |                 |  |
|   |             |  | YES         | NO                             |  |                 |  |
| /K.N./  | 12.         | "Innovative Call Center Solutions" sales brochure materials (undated) by Center Force Technologies distributed at Nov. 1999 conference (21) pages  |             |                                |  |                 |  |
| /K.N./  | 13.         | Rule 132 Declaration by Inventor Djovana Shkreli dated Jan. 6, 2000, 2 pages   |             |                                |  |                 |  |
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| EXAMINER SIGNATURE     /Khai Nguyen/  |             |  |             | DATE CONSIDERED     05/21/2007 |  |                 |  |
| *EXAMINER: Initial if reference considered, whether or not citation is in conformance with MPEP 609. Draw line through citation if not in conformance and not considered. Include copy of this form with next communication to applicant. |             |  |             |                                |  |                 |  |





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Title of  
Invention

INTELLIGENT CALL ROUTING FOR CROSS-SELL OFFER  
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Search string: ( 6175563 or 6301351 or 6311231 or 6327359  
or 6330327 or 6038552 or 6301567 or 6513018  
or 6597775 or 5878130 or 5898762 or 5917893  
or 5974120 or 6049811 or 6134315 or  
20020029154 or 20020049691 ).pn.

### US Patent Documents

Note: Applicant is not required to submit a paper copy of cited US Patent Documents

| init | Cite.No. | Patent No. | Date       | Patentee        | Kind | Class | Subclass |
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## US Published Applications

Note: Applicant is not required to submit a paper copy of cited US Published Applications

| init | Cite.No. | Pub. No.    | Date       | Applicant             | Kind | Class | Subclass |
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| K.N. | / 1      | 20020029154 | 2002-03-07 | Majoor, Johannes W.F. |      |       |          |
| K.N. | / 2      | 20020049691 | 2002-04-25 | Majoor, Johannes W.F. |      |       |          |

## Signature

| Examiner Name | Date       |
|---------------|------------|
| /Khai Nguyen/ | 05/21/2007 |